Ongoing How Do I Guide

Assessments

Family Assessment

How Do I…?	Selections	Tips & Guidelines
Initiate family assessment	▪ Click Create > Case Work > Family Assessment > Family Assessment. ▪ Click the appropriate case. ▪ Click the Create button. ▪ On the Family Assessment page, enter the applicable data/values ▪ Click Save and click Close.	*In order to ensure that you have reassessed the child's safety at this time, the system will give you a reminder message to complete a safety assessment in addition to the family assessment.*
Update/complete family assessment	▪ On the Cases outliner, click the appropriate case icon. ▪ Click the Family Assessment icon and click the pending Family Assessment link. ▪ On the Family Assessment page, enter the applicable data/values. ▪ On the Domain I tab, select Approval from the Options list. Click Go. ▪ Select Approve on Approval History page. Click Continue. ▪ Click Save and Close on the Family Assessment page.	*The worker or supervisor may override the system-calculated family service level shown on the Family Service Level tab of the Family Assessment page.* *The Family Assessment and Family Assessment Summary templates are accessed via the Options list.*

Safety Assessment

How Do I…?	Selections	Tips & Guidelines
Reassess child safety	▪ Click Create > Case Work > Safety Assessment > Safety Assessment. ▪ Click the appropriate case. ▪ Click the Create button. ▪ On the Safety Assessment page, enter the applicable data/values. ▪ Click Save and click Close.	*While an assessment of the child's safety was completed as part of the initial assessment, it is very important to reassess safety of the child at the time you are completing the family assessment.*
Update/complete child safety reassessment	▪ On the Cases outliner, click the appropriate case icon. ▪ Click the Safety Assessment icon and click the Safety Assessment link. ▪ On the Safety Assessment page, enter the applicable data/values. ▪ On the Results tab, select Approval from the Options list. Click Go. ▪ Select Approve on Approval History page. Click Continue. ▪ Click Save and Close on the Safety Assessment page.	*The Safety Assessment template may be accessed via the Results tab by clicking the Options list > Safety Assessment.* *The Safety Cause Analysis and Safety Case Closure templates are accessible from the Options list once their respective checkboxes have been selected on the Results tab.*

Plans

Safety Analysis and Plan

How Do I…?	Selections	Tips & Guidelines
Establish safety analysis and plan	▪ Click Create > Case Work > Planning > Safety Analysis and Plan. ▪ Click the appropriate case. ▪ Click the Create button. ▪ On the Safety Analysis and Plan page, enter the applicable data/values.	*Use Insert button or Delete link to add/remove services on Safety Services tab.*

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Plans (continued)

Update in-home services provider information	▪ On the Safety Services tab, complete the Service Category and Service Type information.
	▪ Click the Search link to find a provider.
	▪ On the Provider Search Organization page, enter the applicable data/values and click the Search button.
	  ▪ For a match: Click the applicable provider radio button and click Continue.
	  ▪ For no match: Click the Close button and complete the Other Provider field on the Safety Services tab.	

Update/complete safety analysis and plan	▪ On the Cases outliner, click appropriate case icon. ▪ Click Planning icon> pending Safety Analysis and Plan link. ▪ On the Safety Analysis and Plan page, enter the applicable data/values. ▪ On the Family Conditions tab, select Approval from Options list. Click Go. ▪ Select Approve and Click Continue. ▪ Click Save and click Close.	*The Safety Analysis and Plan template may be accessed via the Safety Services tab by selecting Safety Analysis Plan from Options list.*

Out of Home Safety Plan

How Do I…?	Selections	Tips & Guidelines
Establish out of home safety plan	▪ Click Create > Case Work > Planning > Out of Home Safety Plan. ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ On the Out of Home Safety Plan page, enter the applicable data/values.	
Add new placement information	▪ On the Cases outliner, click appropriate case icon. ▪ Click Planning icon > pending Out of Home Safety Plan link. ▪ On the Placement tab, enter the applicable data/values. ▪ Click the Search link to enter provider name. ▪ On the Provider Search page, enter the applicable data/values and click the Search button. ▪ Click the provider and click Continue.	*The ICWA Placement Provider Options box contains five questions related to the placement of a Native American Indian child.*
Update/complete out of home safety plan	▪ On the Cases outliner, click appropriate case icon. ▪ Click Planning > pending Out of Home Safety Plan link. ▪ On the Out of Home Safety Plan page, enter the applicable data/values. ▪ On the Jurisdiction tab, select Approval from Options list. Click Save and Close buttons.	*The Out of Home Safety Plan template may be accessed via the Placement tab by selecting Out of Home Safety Plan from Options list.*
Terminate out of home safety plan	▪ On the Cases outliner, click appropriate case icon. ▪ Click Planning icon> ongoing Out of Home Safety Plan link. ▪ On the Out of Home Safety Plan page/ Jurisdiction tab, select Terminate from Options list. Click Go. ▪ On the Terminate Plan page, enter the applicable data/values. ▪ Select Approval from Options list, Click Go. ▪ Select Approve and Click Continue. ▪ Click Save and click Close.	

Plans (continued)

Permanency Plan

How Do I…?	Selections	Tips & Guidelines
Establish permanency plan	▪ Click Create > Case Work > Planning > Permanency Plan. ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ On the Permanency Plan Select page, click the Copy link to copy an existing permanency plan or click the Create button to create a new permanency plan. ▪ On the Permanency Plan page, enter the applicable data/values.	*A permanency plan is completed within 60 days of an out of home placement. Subsequent permanency plans are due every 6 months. A Permanency Plan Due tickler will appear on the Ticklers outliner before the due date.*
Document TPR recommendation/ adoption referral	▪ On the ASFA Review tab, enter the applicable data/values.	
Document determination not to TPR	▪ On the TPR Exceptions tab, enter the applicable data/values.	
Add new placement information	▪ On the Placement tab, enter the applicable data/values. ▪ Click the Search link. ▪ On the Search page, enter the applicable data/values. ▪ Click the Search button. ▪ Select the provider and click Continue.	
Update/complete permanency plan	▪ On the Cases outliner, click the appropriate case icon. ▪ Click the Planning icon and select the pending permanency plan. ▪ On the Permanency Plan page, enter the applicable data/values. ▪ On the Basic tab, select Approval from the Options list. Click Go. ▪ Select Approve and Click Continue. ▪ Click Save and click Close.	*The Permanency Plan template may be accessed selecting Permanency Plan from the Options list and clicking Go.* *The Permanency Plan template contains many fields which pre-fill information from various windows in the system. A template mapping document is available on the Knowledge Web for detailed template information.*
Terminate permanency plan	▪ On the Cases outliner, click the appropriate case icon. ▪ Click the Planning icon and select the ongoing permanency plan. ▪ On the Basic tab, select Terminate from the Options list. Click Go. ▪ On the Terminate Plan page, enter the applicable data/values. ▪ Select Approval from the Options list. Click Go. ▪ Select Approve and Click Continue. ▪ Click Save and click Close.	

Visiting Plan

How Do I…?	Selections	Tips & Guidelines
Complete visiting plan	▪ Click Create > Case Work > Planning > Visiting Plan. ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ On the Forms page, select Visiting Plan from Options list. Click Go button. ▪ On the Visiting Plan template, enter the applicable data/values. ▪ Click Close and Return to eWiSACWIS. ▪ Click Save and click Close.	

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Plans (continued)

Case Plan

How Do I…?	Selections	Tips & Guidelines
Establish case plan	▪ Click Create > Case Work > Planning > Case Plan. ▪ Click the appropriate case. ▪ Click the Create button. ▪ On the Case Plan page, enter the applicable data/values. ▪ Click Save and click Close.	*A case plan cannot be completed if a Family Assessment is in progress.* *Use the Insert button to add new case plan items.*
Update/complete pending case plan	▪ On the Cases outliner, click the appropriate case icon. ▪ Click the Planning icon and select the pending Case Plan link. ▪ On the Case Plan page/Outcomes tab, click the Edit link for the applicable case plan item. ▪ On the Maintain Case Plan Item page, enter the applicable data/values, including the specific goal(s). ▪ Click the Save button and Close. ▪ On the Case Plan page/Outcomes tab, select Approval from the Options list. Click Go. ▪ Select Approve and Click Continue. ▪ Click Save and click Close.	*To avoid having to re-enter general desired outcome and specific goal information that is the same for more than one participant, you can use the Copy Detail link on Case Plan page to copy the information that you have already entered for one participant to the other selected participant(s).* *The Case Plan template may be accessed by selecting Case Plan from the Options list and clicking Go.*
Add a general desired outcome and specific goal	▪ On the Case Plan page/Outcomes tab, click the Insert button. ▪ On the Maintain Case Plan Item page, select the appropriate participant, domain, element, and general desired outcome and add the specific goal information.	*To add more than one specific goal, click the Insert button on the Maintain Case Plan Item page.*

Update provider information	▪ On the Case Plan page/Outcomes tab, click the Edit link for the applicable case plan item.
	▪ On the Maintain Case Plan Item page, click the Remove link for the provider to remove the existing provider. The Remove link becomes a Search link after the existing provider is removed.
	▪ Click the Search link.
	▪ On the Provider Search page, enter the applicable data/values and click the Search button.
	  ▪ For a match: Click the radio button for the applicable provider and click Continue.
	  ▪ For no match: Click the Cancel button and complete the Other Provider field on the Maintain Case Plan Item page.
	▪ On the Maintain Case Plan page, enter applicable provider-related data/values.
	▪ Click Save and click Close.	

Update ongoing case plan regarding family summary narratives	▪ On the Cases outliner, click the appropriate case icon. ▪ Click the Planning icon and select the case plan. ▪ On the Case Plan page/Family Summary tab, enter text in the narrative fields. ▪ Click Save and click Close.	*Once a Case Plan has been fully approved, a new Case Plan needs to be created to add new General Desired Outcomes or Specific Goals.*

WiSACWIS Knowledge Web

http://dhfs.wisconsin.gov/wisacwis/knowledge_web/index.htm

WiSACWIS Quick Reference Guides

http://dhfs.wisconsin.gov/wisacwis/knowledge_web/Helpdesk/quick_reference_guides.htm

Plans (continued)

How Do I…?	Selections	Tips & Guidelines
Terminate case plan	▪ On the Cases outliner, click the appropriate case icon. ▪ Click the Planning icon and select the case plan. ▪ On the Case Plan page/Outcomes tab, select Terminate Plan from the Options list and click Go. ▪ On the Terminate Plan page, enter the applicable data/values and select Approval from the Options list and click Go.	*A Case Plan cannot be terminated if a pending case progress evaluation exists.*

Case Progress Evaluation

How Do I…?	Selections	Tips & Guidelines
Initiate case progress evaluation	▪ Click Create > Case Work > Planning > Case Progress Evaluation ▪ Click the appropriate case. ▪ Click the Create button. ▪ On the Case Progress Evaluation page, enter the applicable data/values.	*A Case Progress Evaluation Due tickler will appear on the Ticklers expando before the due date. The tickler will be deleted and reset once the supervisor approves the evaluation.*
Record progress toward achieving general desired outcomes and specific goals	▪ On the Case Progress Evaluation page/ Outcomes tab, click the Progress link for the appropriate participant/ general desired outcome. ▪ On the Progress Made page, enter the applicable data/values.	
Update/complete case progress evaluation	▪ On the Cases outliner, click the appropriate case icon. ▪ Click the Planning icon and select the pending Case Progress Evaluation link. ▪ On the Case Progress Evaluation page, enter applicable data/values. ▪ On the Outcomes tab, select Approval from the Options list and click Go.	*The worker or supervisor may override the system-calculated family service level shown on the Family Service Level tab of the Case Progress Evaluation page.* *The Case Progress Evaluation template may be accessed by selecting Case Progress Evaluation from the Options list and clicking Go.*

In Home Service

In Home Service

How Do I…?	Selections	Tips & Guidelines
Document a new in-home service	▪ Click Create > Case Work > Placement > In Home Service. ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ On the In Home Service page/Service tab, enter the applicable data/values. ▪ On the Provider tab, click the Search link ▪ On the Search Provider Service page, enter the applicable data/values and click the Search button. ▪ Select the provider and click Continue. ▪ On the Provider tab, enter applicable data/values. ▪ On the Service tab select Approval from the Options list. Click Go. ▪ Select Approve and Click Continue. ▪ Click Save and click Close.	*Be careful to **enter** the amount in the **Child Specific Rate** field only **after** entering all other applicable data/ values on the Service tab.* *If you enter the child specific rate before entering any supplemental points that may apply and/or other amounts that may apply, the system will delete the child specific rate amount (and consequently no payment will be sent to the provider).* *eWiSACWIS allows multiple In-Home Services to be documented.*
End an in-home service	▪ On the Service tab, select Placement Ending from the Options list. Click Go. ▪ On the Service Ending page, enter the applicable data/values and Select Approval from the Options list. Click Go. ▪ Select Approve and Click Continue. ▪ Click Save and click Close.	

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How Do I Guide

Adoption Referral/TPR

Adoption Referral

How Do I…?	Selections	Tips & Guidelines
Initiate adoption referral	▪ Click Create > Case Work > Adoption > Adoption Referral. ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ On the Adoption Referral page, enter applicable data/values.	*The Ongoing worker completes the General, Birth Parents, Background, and Placements tabs on the Adoption Referral page. The Adoption worker is responsible for completing the Child Summary and Matches tabs of the Adoption Referral page.* *The Adoption Referral page may be started on the CPS Family Case prior to TPR. When the child is deactivated for reason of TPR, the Adoption Referral is copied to the child's pre-adoptive case via a batch process.*
Identify siblings who should be placed with the child in the adoptive placement	▪ On the General tab, click the Insert button. ▪ Enter the Applicable data/values.	
Update child's placement history/ information	▪ On the Placement tab, enter the applicable data/values. ▪ If appropriate, click the Address expando to view child's current placement address.	

TPR

How Do I…?	Selections	Tips & Guidelines
Document TPR	▪ On the Cases outliner, click on the case name link. ▪ On the Maintain Case page, select the Deactivate link for the appropriate participant to be deactivated (child to be TPR'd). ▪ On the Participant Status page, select TPR as the reason, enter the effective date, and additional applicable data/values. Click the Save button and click Close. ▪ In the Deactivate Participant message box, click Yes. ▪ On the Maintain Case page for the child who has been TPR'd, enter the applicable data/values. ▪ Click Save and click Close.	*The effective date must be the TPR date.* *eWiSACWIS automatically creates a new case for the child who has been TPR'd and immediately displays the Maintain Case page for the new case.* *Note: For the child's new case, you'll select Pre Adoptive Child for the Case Type value.*

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